GRASSROOTS TACTICS PLANNING GUIDE

RE-AMP

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WHAT'S INSIDE

ABOUT RE-AMP

RE-AMP is an active network of over 170 nonprofits and foundations across eight Midwestern states working on climate change and energy policy with the goal of reducing global warming emissions economy-wide 80 percent by 2050.

RE-AMP brings environmental, labor, faith, environmental justice, youth, energy, conservation and other groups together to develop common priorities to achieve our climate goals. Historically, RE-AMP has focused increasing clean energy generation, reducing our dependency on coal, investing in energy efficiency, regulating carbon emissions, and decarbonizing transportation. With a wide array of member organizations, RE-AMP provides many opportunities for various constituencies throughout the Midwest.

To help meet RE-AMP's goal of reducing global warming pollution 80 percent by 2050, the RE-AMP Steering Committee created the RE-AMP Organizing Hub. The Organizing Hub brings together targeted policy campaigns and movement building, to build power for long-term success. The Organizing Hub focuses on campaign planning, strategy coaching and campaign skills-building for RE-AMP members.

Effective campaigns build an organization's power, and powerful organizations are able to run increasingly effective campaigns. This guide, with its emphasis on organizing and mobilizing tactics, seeks to help build power within the RE-AMP network so that members can run more effective campaigns in the short term and build a movement to fight climate change in the long term.

For more information about RE-AMP or the Organizing Hub, please visit www.reamp.org.

INTRODUCTION

WHY WE WROTE THIS GUIDE

For several years now, many RE-AMP members have expressed an interest in increasing the Network's focus on organizing work — organizing and movement building. This has been a consistent theme that the RE-AMP Steering Committee has heard from a wide diversity of members, and the Steering Committee has taken numerous steps to address this voiced concern. Indeed, one steps was the creation of the Organizing Hub. The Organizing Hub, in turn, has strived to offer support for building RE-AMP member efficacy in the areas of campaign planning and execution, with an emphasis on organizing strategies and tactics. The Organizing Hub has hosted conferences with sessions on building grassroots organizing skills and has covered the cost for RE-AMP member group organizers to attend the Wellstone Action organizing training. The Organizing Hub developed this document with the intention of providing a guide to cover the basics of a wide variety of organizing tactics and to give members a baseline of organizing tactics to draw from for application in campaigns and movement building efforts.

HOW TO USE THIS GUIDE

Our intention is to give RE-AMP members a greater stable of organizing tactics to draw from in their advocacy efforts. We offer a brief description of each organizing tactic and then go on to describe the circumstances under which groups should consider using each tactic, how to go about executing the tactic, in some cases pitfalls to avoid, and in some cases an illustrative example of how a RE-AMP member group has used the tactic successfully in helping to achieve a campaign or movement building goal. If your group is familiar with and has substantial experience using all of the tactics in this guide, hopefully the guide will serve as a reminder and review of the diversity of organizing tactic options available to serve specific campaign strategies — a handy display of tools in the organizing toolbox. If there are some organizing tactics in this guide that your group has never used or only dabbled in, we hope this guide will give you the some of the basic information of you'll need to better understand how and when those tactics can be most useful and enough information to at least begin to weave one or more of those tactics into a current or future campaign or movement building effort.

SOME CONTEXT ABOUT WHAT'S NOT IN THIS GUIDE

We recognize that the term "grassroots organizing" is a bit of a term of art and means different things to different people. Our focus in this guide is on tactics commonly used for organizing and mobilizing grassroots supporters in social change policy campaigns, and particularly in environmental policy campaigns. The Organizing Hub strongly supports relational organizing efforts (as opposed to transactional organizing efforts), and we urge readers to strongly consider the movement-building potential and implications of any and all organizing work that they do. Each of the tactics described in this guide should be approached with these important principles in mind. Our hope is that this guide is just the first step in a dialogue within RE-AMP about how to most effectively conduct organizing work in a way to maximize relationship building and ultimately movement building. Consider this guide as a first edition and give us feedback and more examples, and we will be eager to publish a second and subsequent editions that expand on these important topics.

WHERE THE INFORMATION CAME FROM

In some ways, this guide is a testimony to the diversity of strategies and tactics employed by RE-AMP member groups. This guide discusses 20 distinct grassroots tactics and every one of them has been used successfully by more than one RE-AMP member group. To write this guide, we first surveyed the entire RE-AMP membership in spring 2016 to determine the extent and frequency with which each is used in the network. The survey helped us answer questions such as which tactics are the most common "go-to" tactics for most members. Which tactics do RE-AMP member groups have the least experience with? Which tactics are ones that RE-AMP members are most interested in trying for the first time? Which do groups most want additional information about?

In addition, we mined the RE-AMP Learning and Progress database, reviewing several years' worth of grant reports for the application of the organizing tactics and their use both in successful and unsuccessful campaigns. Based on this research (the network-wide survey and review of the L&P database) we selected a group of organizers and campaign planners from the RE-AMP member groups to conduct one-on-one interviews with to flesh out in-depth descriptions of how, when and where they used particular tactics and what they felt are the keys to successful execution of them in an effort to compile best practices. And, of course, the authors of this guide drew on their organizing experience.

We compiled and described all of this data and information in this guide in what we hope is an interesting and user-friendly format. Lastly, we asked some of the most experienced and most accomplished organizers to read through a rough draft of the completed report and give us feedback. We edited, tweaked, bolstered and strengthened the text based on the input of these network experts and this is the final guide. We hope you find it insightful and useful.

BEFORE YOU CHOOSE A TACTIC: CAMPAIGN PLANNING

It's important to understand that this guide only deals with grassroots organizing tactics, as opposed to grassroots organizing strategies or the even broader topic of building grassroots organizing capacity within your organization or coalition. Whether you are employing grassroots organizing tactics, grasstops organizing tactics, lobbying or other tactics, it's important that the tactics are grounded in a complete and well-thought-out campaign plan. The tactics you choose need to be part of a broader strategy which, in turn, is dictated by your campaign plan goals. Consult "The Art of Campaign Planning" to make sure that you are thinking about which grassroots organizing tactics to use in the right context. For a much more in-depth treatment of grassroots organizing strategies and tactics, get a copy of the The Midwest Academy Manual: Organizing for Social Change (link below) or a similar organizing textbook.

And lastly, no guide (or any other document) is a substitute for professional training. The Organizing Hub has paid for the full cost of training for many RE-AMP members with Wellstone Action and we hope to do the same for many more. The Midwest Academy is another organization that specializes in grassroots organizing training and does an excellent job.

RESOURCES

The Art of Campaign Planning

www.reamp.org/resources/ organizing-hub

The Midwest Academy Manual: Organizing for Social Change

www.midwestacademy.com/manual

RE-AMP MEMBER GRASSROOTS TACTICS SURVEY

As we mentioned above, one way we went about gathering data for this guide was by conducting an online survey of RE-AMP members. In total, 41 RE-AMP member groups completed the survey; looking at the list of respondents and the survey results, it would appear that most of the groups that are heavily invested in grassroots organizing completed the survey. The following tables will give you some sense which grassroots organizing tactics are most popular among RE-AMP members (which are used the most, which are used the least) and which tactics RE-AMP members would like more information about.

WHO COMPLETED THE SURVEY

Total Responses: 41

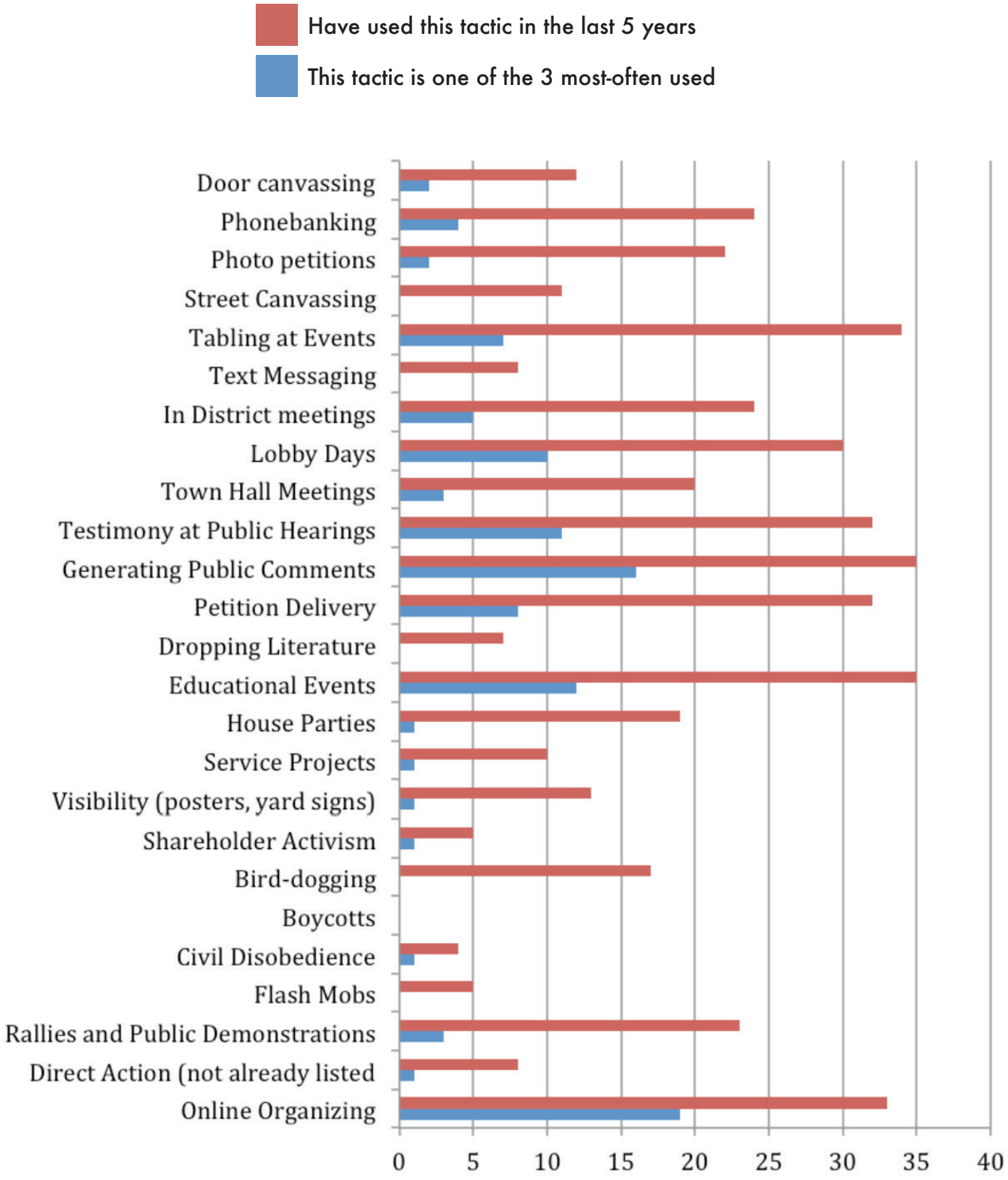
How would you characterize your organization?

Type of organization	Percent
Faith group	22%
Environment justice group	15%
Consumer rights group	12%
Youth group	12%
Labor group	2%
Environmental group	68%
Private foundation	0%
Grassroots group	37%
Other	30%

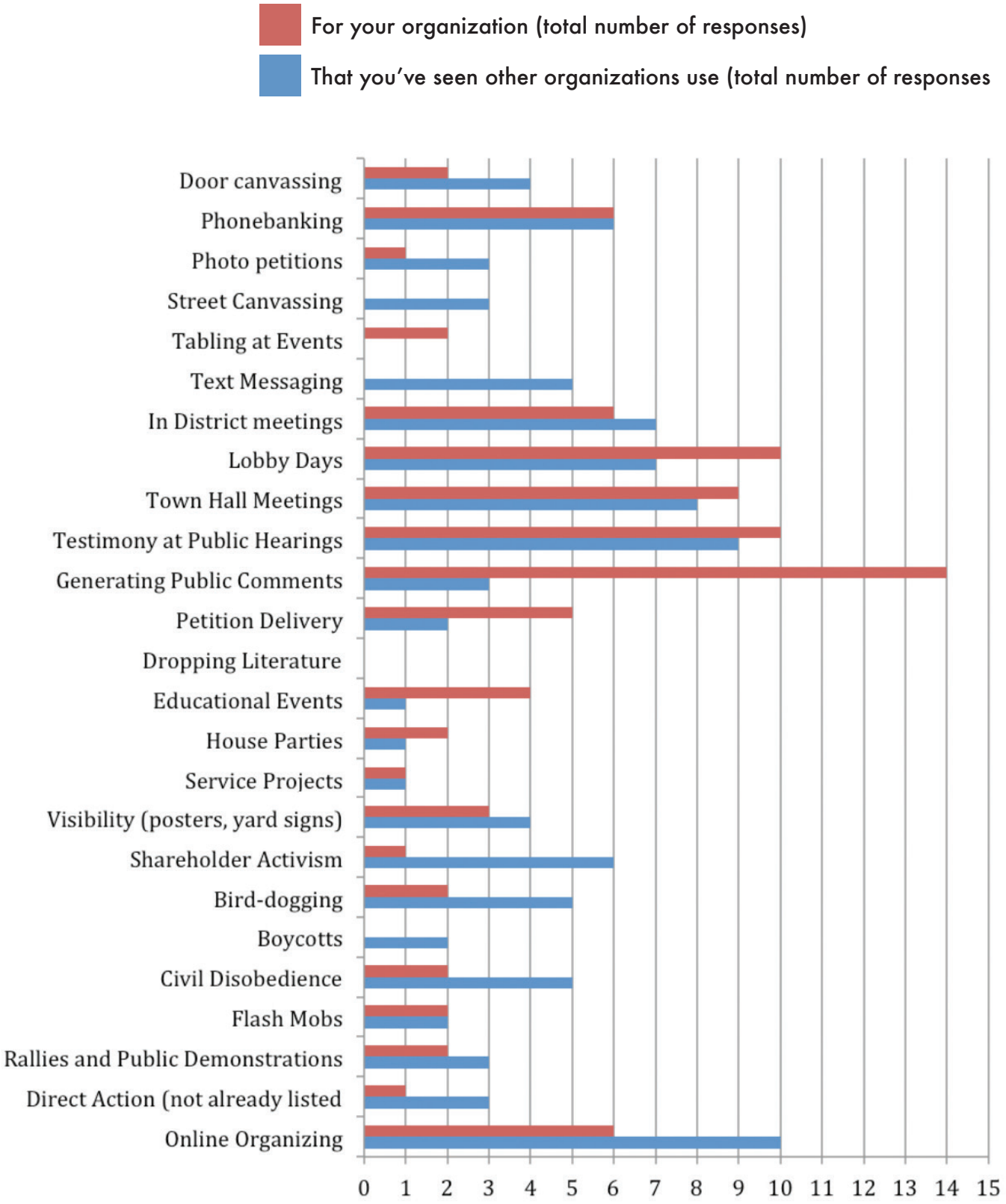
What tactics are you interested in learning more about?

#1 Online organizing (40% of respondents)
#1 Shareholder activism (40%)
#3 Visibility tactics, like chalking, postering (30%)
#4 Townhall meetings or accountability sessions (23%)
#4 Flash mobs, street theatre (23%)
#5 Boycotts (20%)

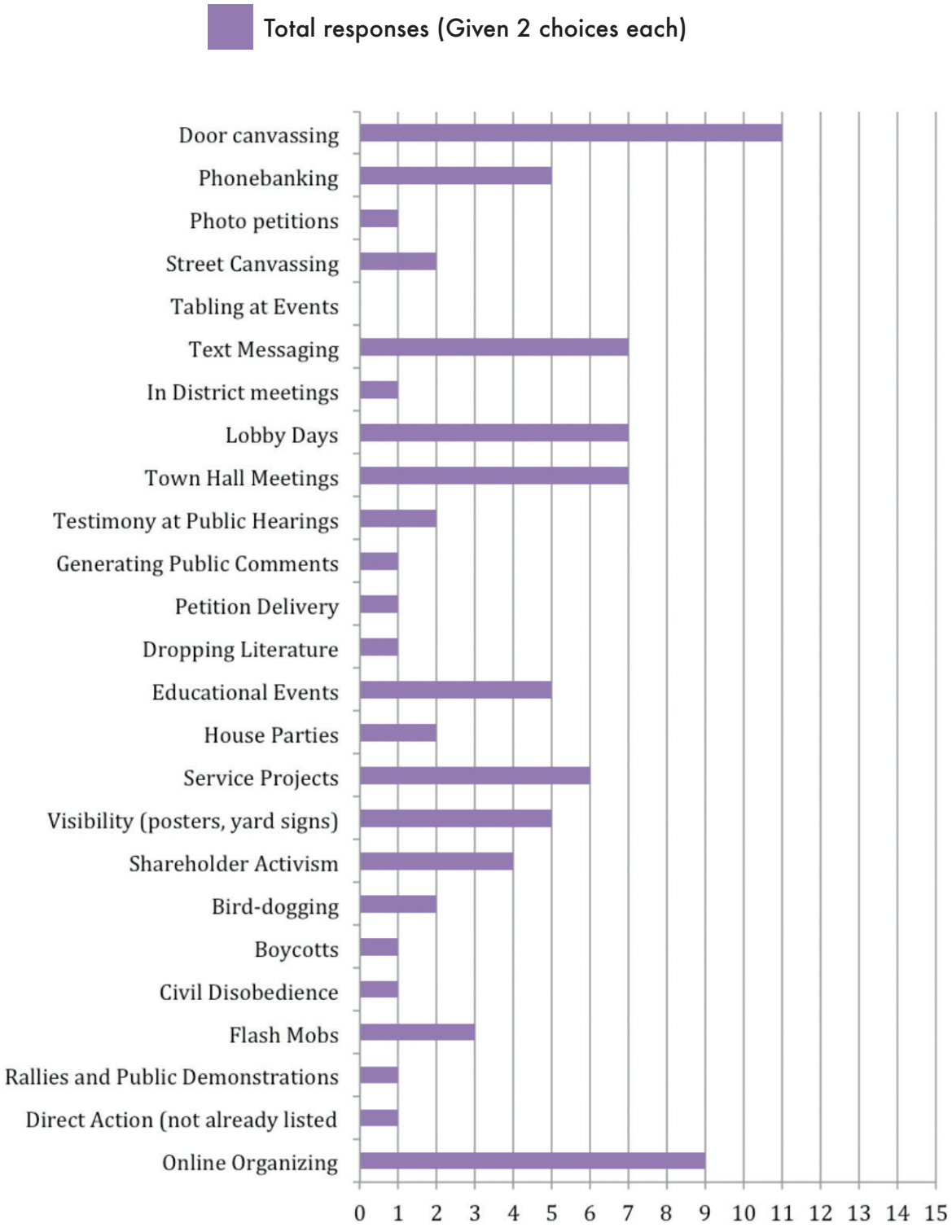
WHAT TACTICS HAS YOUR GROUP USED?



WHAT TACTICS HAVE BEEN MOST EFFECTIVE AT WINNING CAMPAIGNS?



IF YOU HAD AN UNLIMITED BUDGET AND THE EXPERTISE, WHAT TACTICS WOULD YOU USE NOW THAT YOU DON'T ALREADY?



People's Climate March, NYC
Credit: Elizabeth Stilwell, Flickr

DOOR-TO-DOOR CANVASSING

Canvassing door-to-door is a time-honored tactic used for a wide variety of advocacy or civic engagement outcomes including social change fundraising, collecting signatures to get candidates on ballots, getting out the vote as election day draws near, expanding membership, conducting surveys and grassroots organizing to influence a campaign target. Here we focus on the use of door-to-door (door) canvassing for the purpose of grassroots organizing in a policy campaign context (to influence a decision-maker target). Canvassing involves knocking on doors in a specific neighborhood to educate and engage residents and ask them to take an action, from a signature of support on a petition, to putting their name on a volunteer list. Face-to-face contact can be one of the deeper levels of engagement and canvassing a targeted neighborhood gives you political power by organizing an explicit constituency.

Research has been conducted demonstrating the ability of a well-run door canvass to educate citizens and even influence their attitudes about a given issue or policy. A combination of written materials and verbal communication (a "rap" or script) are used to engage citizens and impart information critical to helping citizens understand how the issue or campaign can affect their life, or their family, and how they can take simple actions that will influence the outcome of the campaign or effort the canvasser is explaining. Common actions that canvassers successfully recruit citizens to take at the door are: signing a petition (that is later delivered to a target), signing postcards (that are later delivered to a target), writing letters (that are later delivered to a target or submitted to the media), signing up to attend an event or volunteer. The possibilities for actions that can be taken at the door are endless based on the creativity of your campaign plan.

In 2012, Michigan Clean Water Fund used door-to-door canvassing as a tactic on their Save the Cherries campaign by highlighting how increased extreme weather events, related to global warming, impact and fuel unpredictable thaws and frosts that destroy cherry blossoms. The National Cherry Festival in Traverse City is held annually in July, and Clean Water Fund takes a week-long trip to canvass the area. Canvassing was part of their micromessaging strategy to reach a traditionally conservative constituency. To be successful, they tailored their talking points to highlight how cherries drive the local economy and define the community. Collecting over 1,700 signatures from these non-traditional allies was critical to influencing the NSPS (New Source Pollution Standard) rule on carbon emissions to fight global warming.

WHEN TO USE
DOOR-TO-DOOR CANVASSING

- Do you need to identify new or more members of the public who support your issue, who aren't coming to you on their own?
- Will building support in a specific town or community make an impact because it's the community of a person you are trying to influence or because you want to show that people who live in X community support this?
- Do you need to have deeper interactions with people because your ask is greater? If you're looking for money, volunteers, or to change people's minds on an issue, a personal interaction through canvassing will be more motivating than a flyer or email.
- Do you want to gather information from the community? Are you trying to evaluate your campaign goals to make sure it's what people want, or trying to bring more people into how you are going about it? Canvassing allows you to get feedback from people outside your inner circle to make sure what your campaign is informed by public opinion.

PRO TIPS:

Maximize training opportunities

- Have a good amount of trainers working with people before they knock on doors; one trainer for every two trainees, if possible.
- Check in with people as they are knocking.
- Debrief the tactic afterward.

Double check the logistics

- Does each person have the right amount of doors to knock on their list?
- Do we know how to get to this neighborhood?
- Do we have any previous experience here? If you don't know an area, try to scout it by driving through first.

Research has been conducted demonstrating the ability of a well-run door canvass to educate citizens and even influence their attitudes about a given issue or policy.

HOW TO DO DOOR-TO-DOOR CANVASSING

A few different ways to go about running a door-to-door canvass:

A. Outsource a canvass to another organization.

Your organization can contract with another group that specializes in running full-time canvasses and will hire and manage a staff to canvass either in your organization's name or as a coalition partner on your issue. These professional canvass groups provide expertise in training and by using a staff that works full-time can deliver much greater results than a volunteer run canvass. Within the RE-AMP Network, Clean Water Action of Minnesota is such a group that other RE-AMP member groups have contracted with run canvass operations. The Hudson Bay Company is one of the larger national groups that specializes in running canvasses for political and policy campaigns.

B. Train a team of volunteers.

Best practices for training volunteers to canvass include the following: Develop a script or bullet points for what people will say at the door. Run trainings where canvassers practice or role-play different scenarios at the door before going out. Have new canvassers spend time shadowing experienced canvassers at the door before going on their own. A volunteer-run canvass will develop more leaders because there is a huge training component.

C. Work in coalitions.

As part of a coalition you may be able to take advantage of a professional canvass operation without entering a formal contract and paying for those services. Illinois Environmental Council works in coalitions with groups who run canvasses because they have large membership and volunteer bases, such as the Sierra Club.

D. Prepare the logistics.

Here are a few tips for setting up a canvass whether it is led by volunteers or your own staff. Develop maps of neighborhoods, a plan for where everyone is going and make sure they have the right amount of doors for how long they are going out (typically in an urban neighborhood, you can knock on 30 doors an hour and in a rural neighborhood 15). Track the results well: How many doors did the person knock on, how many people said yes, how many said they would volunteer, etc.? With good tracking, you can both plan better for the future, but also go back in the same neighborhood over time, develop deeper relationships, and really get to know a district. One of the best advantages of canvassing is picking a geographic neighborhood that has strategic value in targeting a specific constituency or a specific demographic of people that will influence a decision-maker.

STREET CANVASSING

Street canvassing is going to a public area (a pedestrian street, a quad on a college campus, outside a business that attracts your target audience) with a group of two to four people, asking people to stop and hear about a campaign and then take an action, from a signature to putting their name on a volunteer list. This face-to-face contact is a deeper level of engagement and more persuasive, and can give you political power by targeting a specific constituency. You'll want to make sure that you are not canvassing on private property unless you have permission from the property owner.

In 2009, the Sierra Club in Wisconsin was targeting Governor Doyle on a decision about a state-owned power plant. They thought the Governor was likely with them on the issue, but needed a push, so they used street canvassing on campus as a way to gather a lot of petitions quickly and delivered them at a Board of Regents meeting. They emphasized training canassers to approach people passing by (not just sit back), while being mindful to balance the approach with not being too pushy.

PRO TIPS:

Double up

» Work in pairs or small groups near each other to help provide more legitimacy and give more training.

Avoid this common pitfall

» If an area is too high traffic (think middle of Manhattan or a busy concert), it will feel like a lot of people are saying no. Track how many people actually stop and say yes in an hour: is this what you expected? If so, it's still a good spot.

HOW TO STREET CANVASSING

You can street canvass either in public or private locations. Public spaces don't require any permission and would include downtown streets or free speech areas on college campuses) sometimes these are designated zones on a campus where non-student groups can be). Legally, you're allowed to be in these areas, as long as you're not disrupting people, but if you're standing in front of or near a business, it's probably a good idea to make sure that you are on good terms with them.

You can also work with businesses to get approval to canvass on private property, such as in the parking lot of a grocery store or inside the gates of an event, by speaking to a manager.

PHONEBANKING

Phonebanking involves a crew of professionals or volunteers calling a list of citizens and asking them to take a specific action to further your advocacy goals.

Typical "asks" can range from "will you come to our event" or "will you submit a letter to the local newspaper describing your support for policy" or "will you make a call right now to your legislative representative and tell her/him to vote no on bill #123?" The personal contact and opportunity to have a conversation makes it more persuasive than passive ways of getting out information (like email), but less so than face-to- face interactions (like door canvassing), with the benefit of being able to go through a larger list of people relatively quickly. In addition to building political power by calling a list from a specific neighborhood, a list could be of a specific demographic across a wider geography (parent association members; senior citizens; farmers; etc) The most common use of policy campaign phone banks is for "patch-through" calls; when a staff member or volunteer calls someone, at the end of the conversation they ask that person if he/she would deliver a message to their legislator (or other target) and if they say yes, they are immediately then patched through to the legislator's phone line. While you may be most familiar with phone banks in the context of electoral work, many C3 campaigns use phone banks, for example they have done this to generate comments for the Clean Power Plan and turn people out to public hearings.

In a long battle from 2013 to 2016, Ohio Citizen Action used phonebanking in a campaign to stop the Public Utilities Commission from bailing out old coal plants. Their strategy was to use public pressure and raise the profile of this to a national issue. They were targeting Public Utilities Commission of Ohio (PUCO) Commissioners and the Governor, who even though he didn't technically vote on this, had appointed all of the Commissioners, so had influence. They called the public, and

PRO TIPS:

Smaller is better

» Set up people to call in a smaller room space than you would initially think and have people call near each other rather than farther away. If people can overhear each other they will pick up good practices, see that it works, they can ask questions, and you can drive the overall goals of what the group is accomplishing. This creates momentum.

Avoid this common pitfall

» Nail the logistics by double-checking: do we have enough phones, if people are using their own cell phones are they OK with using their own minutes, is there cell phone service, are cell phones charged?

asked them to call their elected officials, generating 4,500 calls to the Commissioners and Governor in 8 months.

Ohio Citizen Action recommends creating a call script that uses language anyone can understand, thinks about the audience, and not getting too far into the weeds, because saying too much actually makes people feel like they need more information to take action. You want callers to have a conversation with people, but then you also want to figure out some type of quality control to make sure people stay on message. Have callers practice with each other before making calls and if other program or advocacy staff can make calls with a group that will make people even more effective.

In 2016, Wisconsin League of Conservation Voters (LCV) used phonebanking to defeat a bad groundwater bill. They had only three days to respond to the bill from when they found out about it. First they sent an email to members, then when they called them, they prioritized people who had opened the email or taken action on the email, starting with a thank you for taking action online. They ask people who make calls to call back the phonebanker and report any information they get from the legislator's office and use that intelligence to inform their lobbying.

HOW TO DO PHONEBANKING

A few different ways to run a phonebank:

A. Contracting with an organization that can provide paid staff

Ohio Citizen Action and Clean Water Action of Minnesota are examples of RE-AMP member groups that will contract with other organizations to use their paid staff to make calls. Groups thinking about contracting with a group that runs a professional phone bank of this type can start with something small to test the waters. A contract with social change advocacy organizers will get better results than a contract with a sales organization because the callers are more passionate, and often more educated, about the issues they're calling about.

B. Running a volunteer phonebank

Have a script or bullet points for callers. Some groups give callers bullet points with broad principles because the callers will be more natural and personal if they use their own voice and words; this takes a little more training, plus a way of making sure people stay on message.

When making calls, more people will not answer their phone than do, and some people will say no. Setting clear goals with people before they start calling ("in one hour, you should be able to call X numbers, expect X amount of people to pick up, and X amount to say yes)", will help people evaluate their success.

Tracking the results will help you evaluate what's working. For instance, if everyone else was calling through 20 numbers in an hour and volunteer X called through ten, then that's what you need to fix; maybe it's something about the space they called from or another logistical problem. If they called through 20, and had the average amount of people pick up, but they only had one person say yes, when the other callers had five, then it's something about what they are saying that can be improved.

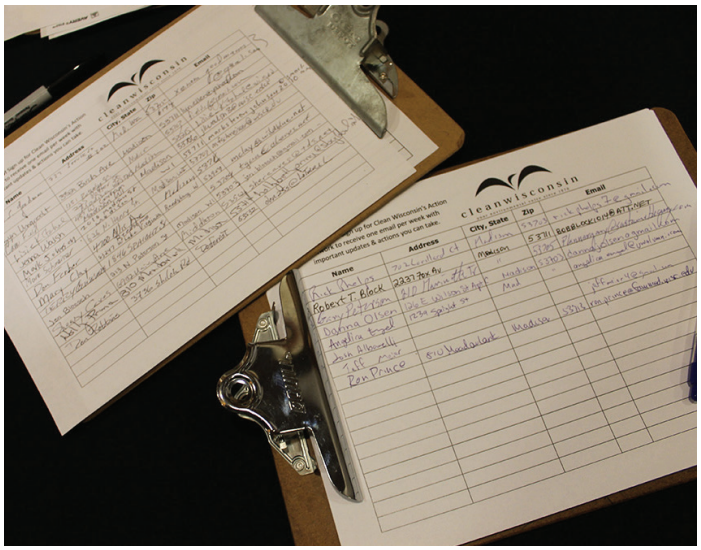
TABLING AT EVENTS

Tabling involves setting up a table at a public event that is connected to your issue and talking to attendees to gather names, collect signatures, or distribute information. These are large gatherings of like-minded folks where you can recruit new volunteers, build lists, network with allies, and raise awareness of your organization and campaign to a specific community. This is often done at events such as Earth Day events or conferences and it is useful to have some kind of professionally built display to attract attendees, and make your organization's name recognizable from some distance.

Having lots of issue-related written information (e.g. fact sheets) at the table is a must and having organizational swag such as water bottles, tote bags, key rings and the like is also helpful to attract prospective volunteers. Giving people an action to take right there on the spot, whether it's taking a photo with a word bubble they fill out on the issue, signing a postcard or writing a letter, increase the urgency as well as the interest level in the activity.

It's important to train your staff in tabling so they are equipped to engage passersby. If you just passively sit back and wait for people to ask you questions, you are much less likely to get your petition signed or volunteers to sign up, or whatever objective you have with the tabling. You want to treat it more-or-less like stationary street canvassing.

Most groups are frequently invited to table at events and it can be tempting to do it just for the visibility, or because you think that people attending that conference expect to see your group there. We urge you to have some formal criteria in place that you use to filter or screen these opportunities and one of the primary criteria should be to have specific actions for attendees to take that directly support a campaign or have a very specific use for volunteers, and in any event, have a plan in place of how you'll follow up with volunteers or anyone that takes an action at your table. Also, think about the expected outcome(s) you'd like from the tabling



HOW TO DO TABLING AT EVENTS

You'll need to contact conference organizers and find out if there is a cost associated with the ability to table; there often is a fee.

Make sure you know if they are providing the table itself and how soon before the event begins can get your table set up.

Know how you're going to engage people to draw them over to your table, then have a fairly specific rap to get yourself started. Often it's a question that you ask: "Are you familiar with the state's new energy plan?"

such as recruiting volunteers, getting people to take action, maybe even raising money for your cause. Weigh the return-on-investment of your outcomes with the time (and if there is one, fee) for conducting tabling.

PRO TIPS:

Smaller is better

- Use a simple petition on a popular issue and ask for signatures as a way to initially engage attendees and then begin a longer conversation about your organization, taking on a volunteer role, or explain an upcoming event.
- Actively greet people when they pass by rather than passively letting people approach the table. This will be a little outside most people's comfort zone, but the results will be dramatically higher in terms of people that stop, and it's absolutely possible to do this in a way that won't be annoying. Make eye contact, smile, and even just saying "Hi, how are you?" or a quick grab line like "Hi, do you have a minute to protect clean water?", and if people say no thanks, "no problem, have a great day."

Avoid this common pitfall

- The initial interaction is not very deep and you may end up with a large list of names, so have a plan to follow-up with people right away (the same day, next day, or same week) and ask people to do something else or find out more about them.

It's important to train your staff in tabling so they are equipped to engage passersby. If you just passively sit back and wait for people to ask you questions, you are much less likely to achieve your objective.

HOUSE PARTIES

Typically house parties require a staff person, board member, or an active member/ volunteer of your organization bringing together friends, family, neighbors and new people to his or her home (or a restaurant, library) with both a social aspect (coffee, drinks, food, movie screening, etc.) and an action agenda. This agenda which includes a briefing by your staff with expertise and ideally an action, or planning that leads to an action such as planning a canvass operation, or, writing letters-to-the-editor.

Because these are local and personal, this can be a fun and easy way for people to reach out to and engage their personal networks and bring new people into an issue, campaign or organization. The informal setting and existing relationships between people can foster a deeper level of engagement with more discussion and idea-sharing.

House parties are good for fostering deeper relationships with individuals who you believe have a lot to offer your organization. House parties might be a good way to bring in people for whom a social interaction would be the best way to get them to show up. They are also a good tactic if you are trying to build teams with neighborhood focus (your goal is to influence a decision-maker in a specific area, or your issue is connected to or can be framed in terms of a specific neighborhood).

HOW TO DO HOUSE PARTIES

The first part is just like throwing a dinner party: make the space nice, make it fun have music and food, and invite friends. Then, it's just like any other meeting, where you'd have an agenda and ask. The only difference is that house parties may be more social and informal so you want to make sure you have a clear goal for the meeting, such as five people will say yes to coming to our lobby meeting or ten people will write a letter to the editor.

PRO TIPS:

Ask for action

» Have people take action at the house party. If your ask is writing letters to the editor, have people do it there; if your ask is reaching out to organizations, have a few laptops set up and ask people to build a list and send emails right then.

Avoid this common pitfall

» Like any house party, one of the keys is having a critical mass of turnout. Be sure that you have a critical mass of friends, co-workers and others who are not your target audience, but whose presence ensure the party is a success from a socializing standpoint for those who are your intended audience.

SUCCESS STORY

USING MULTIPLE ORGANIZING TACTICS TO BEAT THE ODDS IN BANNING TODDLER TOXINS IN MINNESOTA

Senator Jim Metzen was a Democrat, but not a friend of environmental policies. In fact, he was just the opposite. A conservative Democrat, endorsed by the state Chamber of Commerce (and other conservative groups), he was the long-standing Chair of the Business, Industry and Jobs Committee and at that the Commerce Committee and his committee was where progressive bills went to die—an environmental bill graveyard.

The coalition that came together to push for legislation to ban the use of Bisphenol-A (BPA) in kid's products (e.g. sippy cups) used a variety of tactics to move their bill. The coalition held "healthy home parties" with parents, and made presentations at early childhood and parenting classes, sharing information about toxins in children's products and strategies from avoiding exposure….and mentioned a policy that would safeguard their children. In this way, they accumulated a long list of concerned parents and they mobilized those parents to send postcards to Chairman Metzen urging him to give the BPA ban legislation a hearing. That wasn't enough, but the coalition kept up a steady stream of letters, emails and phone calls flowing to Chairman Metzen. They even brought the parents concerned with about their children's health into the capitol to meet with Metzen and his committee members.

Then the group took to the streets and used their canvass to collect postcards as well—thousands of postcards. They even canvassed Chairman Metzen's neighborhood, and got many of his neighbors to sign postcards. The coalition delivered the postcards of support to Chairman Metzen's office in the capitol, held in-district meetings with the Senator, and packed the committee hearing with supporters on the day of the committee vote. Even Metzen couldn't ignore this kind of pressure and he not only held a hearing on the BPA bill but the bill then passed out of his Committee.

Did the coalition celebrate? You bet they did — they celebrated the benevolent Chairman Metzen. They continued to canvass and hold house parties, but now collected letters of gratitude and thanks. They again delivered the letters of thanks to his office, and even made a superhero picture in Metzen's likeness and delivered it with the letters. They praised their new ally.

This is a great example of how many of the tactics laid out this guide were used in combination to achieve a victory that seemed impossible at the outset.

That is how Minnesota became the first state in the nation to ban BPA in children's products. This is a great example of how many of the tactics laid out this guide were used in combination to achieve a victory that seemed impossible at the outset. The advocates held successful house parties (with an educational/service bent to them), canvassed door-to-door (in the target's neighborhood!), and executed a "petition (in this case "letter") delivery to the target.

LOBBY DAY

Organizing a Lobby Day involves bringing a group of people to the state or federal Capitol to meet with and lobby their elected officials on a range of issues, to both show support from constituents and build relationships between your organization and legislators and between your organization and the grassroots and grasstops folks you are bringing in to lobby. Often lobby days are used as a way to get a particularly good constituency from a messaging standpoint to deliver a message directly to your target legislators.

For this reason, lobby days often focus on bringing, for example, businesses or farmers to the Capitol. Many state League of Conservation Voters groups have an annuall lobby day at a particular time (e.g. at the outset) every legislative session. The League of Conservation Voters will often place an emphasis on bringing sporting group representatives to their lobby days. Of course, it is always more effective to have individuals from a legislator's district meeting with them. In some states there are particular geographic regions that organize a lobby day.

WHEN TO HOLD A LOBBY DAY

The first threshold is if you have a piece of legislation and hearing from constituents would influence it. But other things to consider include:

- Is this an opportunity to do relationship and movement building by helping to give others a voice in the Capitol?
- Will hearing from constituents have a unique effect that other types of lobbying wouldn't? Constituents have power as voters, but they also have personal stories about an issue, for example how water pollution might have affected their families' health.

PRO TIPS:

- Prepare bios, background information, and the political lay-of-the-land on the legislators and use this to create a specific legislative ask ("Will the Congressmember vote for bill #123?" or "Will the Congressmember help gather co-sponsors the bill in X caucus?") as well as an organizational ask ("We would like to invite the Assemblymember to speak at our annual meeting" or "Would she provide a quote for our newsletter?")

Avoid this common pitfall

- People will be better trained to hold the meetings and feel more confident if training starts before the Lobby Day and if there are a lot of trainers to work with all of the volunteers on the day of, to review meeting agendas, background on legislators, and legislation.

LOBBY DAY SUCCESS STORIES

CLEAN WATER FUND, MICHIGAN

In May 2016, Clean Water Fund (Michigan) helped organize a Lobby Day along with a Flint Rising coalition, to call on legislators to replace all lead service lines. They needed more money to fund the solutions to the crisis, and at this time the state was going through the appropriations process. Their strategy was to both have Flint residents there, telling personal stories, and to also show there was a wide range of support from people all across the state who were in solidarity with Flint. At the Lobby Day, Flint residents teamed up with volunteers, met with legislators, and delivered 5,400 letters that had been collected from people across 44 legislative districts.

WISDOM, WISCONSIN

In 2016, WISDOM (a social justice organization in Wisconsin) organized a Lobby Day in Madison, Wisconsin to successfully increase funding for alternative treatments, drug court, by $2 million. They brought 800 people to meet with legislators as part of their strategy to tell real stories of people and demonstrate their commitment to the issue. To prepare and train people to hold the lobby meetings, they emphasized allowing individuals participating in the lobby day to lead the training sessions and preparing other people to talk about the issues; they had transit riders leading trainings on how to talk about transit issues.

HOW TO DO LOBBY DAY

A. Ask big questions.

There are threshold questions you need to answer when you organize a lobby day, with one of the biggest being is whether it is a one-time event or if are you making a commitment to organize a lobby day on some regular basis. Again, if the latter is the case, then you should get in touch with the League of Conservation Voters group in your state (or a neighboring state if you don't have one), as they have a wealth of experience with this approach.

Another big threshold question is whether you are going to schedule all the meetings with every legislator you intend to meet with ahead of time, or whether you are just going to take a large group of businesses or citizens concerned with a specific issue into the Capitol and catch as many legislators as you can. Obviously, the former choice requires much more advanced planning, but the latter choice has pros and cons as well.

Another crucial decision is scheduling the lobby day. Obviously it needs to be at a time when the legislature is in session, but ideally, not a day that is packed with hearings or large floor calendars that will have legislators and their staff tied up for most of the day. Another thing to be aware of is that you often won't get to meet with the legislator themselves. This is not the end of the world. Staff play a critical role in most legislative offices (more in some than others). Often, though not always, legislative aides are young people who appreciate sound information on your issue and are a direct conduit to the decision-maker. The important point is that building a relationship with staff is inevitably very useful and important.

B. Train your lobbyists.

You'll need to spend time training people on the basics, from who they're meeting with and what to wear (formal is usually appropriate), to things more complicated, including tips for building a rapport. Role-playing the meetings will give people a higher level of comfort.

DISTRICT MEETINGS

A district meeting is when constituents hold a meeting with an elected official in the legislator's district (rather than the office at the Capitol) to lobby on an issue with, in most cases, the goal of winning the legislators support for or against a particular piece of legislation (or resolution, administrative rule, etc.).

There are many very significant advantages to meeting with a (target) legislator in her or his district. One of the biggest is that it is much easier to load the meeting up with great messengers whose opinions your target legislator cares about (or at least feels compelled to appear to care about). Here is where power mapping really comes in handy. If you're meeting with a legislator in their district you really should be trying to get multiple business owners, faith leaders, health professionals, and other constituencies (depending on the issue) into that meeting delivering carefully considered/planned messages. Victims of a particular environmental offense that your legislation attempts to address can be particularly persuasive. Another advantage is that it should be much easier to schedule a meeting, and a longer meeting, with a target who is being evasive. By meeting in their district, you are accommodating them (in a relative sense).

All these factors translate into power for your group or coalition; it's really important that you understand how much power you can have in these situations. You have done the legislator a significant favor by taking the time plan the meeting and to invite numerous constituents to share their opinion with them (conveniently close to their home). If you have a room full of people, from different walks of life, all of whom have invested their time, money and sweat equity into that community, you should approach the meeting believing that the target needs to give (even owes) your assembled citizens what they want. The Midwest Academy refers to this as an "accountability session." Again, we urge you to invest in their training for your organizing staff.

HOW TO DO DISTRICT MEETINGS

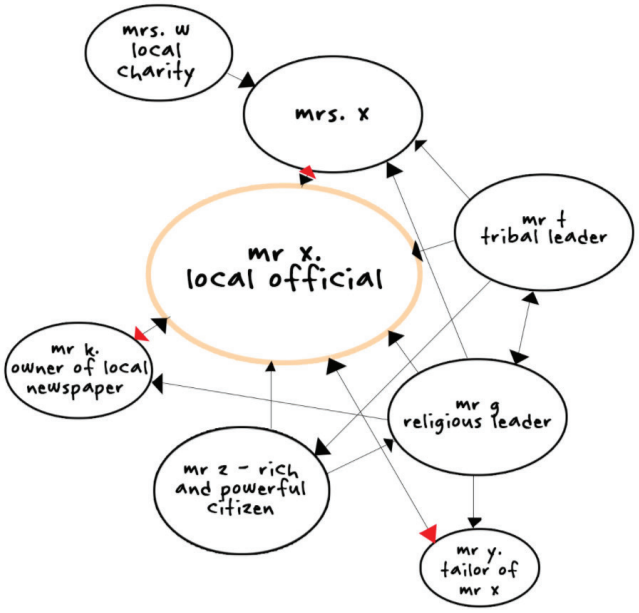
These meetings are typically scheduled in the evening; shoot for a meeting that begins at 6:00 or 6:30 pm. It also allows you to hold the meeting on a more neutral turf. A legislator's office is the place that they usually feel the most comfortable. Sitting in that big cushy chair, looking at you across that wide, heavy desk they feel most empowered. But you decide the location for an in-district meeting. Public libraries often work very well. They are usually free, everyone in town knows exactly where they are, and they are often centrally located.

PRO TIPS:

- It's critical to prep and train a few of your key messengers beforehand and make sure they speak to the target (legislator) as early in the session as possible. Hopefully, you have far too many people in attendance to prep them all, so you need to make sure that you and your best messengers set the (persuasive) tone.
- Make sure your best performing (most influential) messengers in the meeting follow up with target in writing afterwards, especially if the target agrees to vote with you. In that case as many "thank-yous" as possible are key.
- The most important factor is that the lead organizer from your organization (or coalition) orchestrate the entire meeting from the moment it starts until the last person has walked out of the room. You must have complete control of what happens when, and there is no good reason that you shouldn't. The most important moment of the meeting is when that leader makes the (very specific) "ask" of the target. Don't be shy about making the ask repeatedly. "So, can we count on you to support Assembly Bill 266 and protect the citizens in your district form the harmful coal-plant emissions?"
- If the meeting goes well, you should have additional asks prepared (e.g. "Could you provide us a quote for our newsletter?")

WHEN TO HOLD A DISTRICT MEETING

- Any time you can! Well, assuming we're asking this question in the context of an important legislative climate campaign, then, at least any time you can marshal a respectable showing of good messenger constituents. You typically will want to hold these meetings with targets, but they can also be very effective in converting a mildly supportive legislator into more of a champion.



Power mapping will be very helpful for district meetings

ONLINE ORGANIZING

SOCIAL MEDIA, EMAIL, WEBSITES & VIDEOS

At its core, organizing online is unique in the ability to spread information beyond your existing network, identify new supporters, reach people quickly, and create creative content. It can be good tool to drive turnout to events (sending out RSVPs), raise money (emails with 'click to donate'), drive people to more information (making a fun video that gets people to go to your website and find out more about your organization), generate grassroots product (online petitions or asks to call an elected official), and enter into other "online discussions" or groups (asking a group to send out something of yours on their own listserv or posting on Facebook so it gets shared and reaches new people).

In the survey used to create this guide, responses showed that online organizing is a tactic that most every group in RE-AMP uses, and uses frequently, and is also one of the tactics people most want to learn more about doing better. This guide will scratch the surface, and hopefully provide some starting points for expanding on the basics, but there could be much more in-depth work to explore online organizing.

PRO TIPS:

- Set clear and intentional goals about your online action: are you hoping to influence a legislator, fundraise, build a list, etc? It can't necessarily be all of it, but you want to be clear about your goals.
- Target different messages to different types of people on your list.
- Integrate online organizing with other tactics as a way to give people more information: promote a town hall meeting, share photos of supportive legislators after lobby day.

Avoid this common pitfall

- Because most people who use social media use it regularly, you'll want to have timely, updated information on it.

SOCIAL MEDIA SUCCESS STORY

OHIO ENVIRONMENTAL COUNCIL

The Ohio Environmental Council (OEC) used a photo contest on Instagram to reach out to new people and elevate how their organization was able to communicate on global warming. Because many people have a story about the outdoors and how they love it, but many of them may not think of themselves as "environmentalists" they tapped into people's pride in the outdoors asking them to take a photo of themselves in their favorite outdoor spot, and then created a contest. The people who posted had their personal networks vote for their photos either on Instagram, Facebook, or the OEC website, collecting voters contact inforemation and in the process had around 300-percent growth in their online contacts.

HOW TO SOCIAL MEDIA

Facebook

As most people have personal Facebook pages, by creating a Facebook event or page for your organization you can ask people to share your information on their page and reach their network, or create a Facebook event to ask people to RSVP for an event. Because it's so pervasive, your contact with people will tend to be more superficial (people that RSVP on Facebook will likely have a lower show rate than RSVP'ing through a phone call, or you may reach more people with an ask to sign a petition, but the response rate might by lower). Googling 'how to create a Facebook event' or 'Facebook page' will give you the quick steps.

Twitter

Most people use it to send out timely information (such as breaking news or updates on an ongoing event. Twitter is also used to connect with people, such as following specific people to see what information they are talking about or building a network of people that care about your issue and sending them a new report.

Instagram

Instagram is primarily a visual forum with photos and the ability to write long-form captions. This makes it a great way to showcase supporters, tell stories, highlight on-the-ground projects and more.

RALLIES & PUBLIC DEMONSTRATIONS

Rallies & public demonstrations typically consist of bringing together a large group in a public space or at a targeted location to demonstrate overwhelming public support, pressure a decision-maker, energize the public, or build visibility.

Because you need enough people to actually show up for it to be and feel big, there are steps you can take to push turnout (partnering with other organizations, having a good reminder system) but you should also consider to what degree your issue has a viral-nature to it (it's timely and touches people, so the turnout spreads by word of mouth).

Some ways to look at this and help you evaluate this beforehand is asking "is there an existing constituency who already cares about this? How big is the group who cares about this? Who are they? Can we mobilize them?" You need to have a base to build from.

Additionally, people need a reason to turn out. Does showing up to a big public demonstration, does the strategy of showing overwhelming public support make sense for your goal? If you're organizing the march, you need to tell that story of why turning out will make a difference. Giving examples helps, such as when people showed up in airports to protest President Trump's travel ban.

Like any type of recruitment, it's important to have a plan for how you're going to get people there and not assume people will show up on their own.

QUESTIONS TO CONSIDER:

- Is there an existing constituency who already cares about this?
- How big is the group who cares about this?
- Who are they and can we mobilize them?"

RALLY SUCCESS STORY

SIERRA CLUB OHIO

Sierra Club Ohio began working on the Dakote Access Pipeline (DAPL) when the Oceti Sankowin youth ran from Cannonball, North Dakota, to Washington, D.C. in protest of the pipeline. At the request of the Native American Indian Center of Central Ohio, Sierra Club provided meals and lodging for the runners and secured a radio news story that featured one of the youth runners, Sierra Club's Director, and Hollywood Star Shailene Woodley, which aired on public radio stations across five states and in Washington, D.C.

The Native Community then asked the Sierra Club help them with a Columbus Day rally in front of Columbus City Hall. The event featured Native American elders who live in Ohio but are originally from Standing Rock and the Cheyenne River Sioux Tribes, as well as a traditional Native American dancer. The event had more than 150 in attendance and was picked up by four TV news stations as well as the Associated Press, which ran a story about the event in more than 200 papers across the country. The headline was "Native Americans Protest Pipeline and Call for Clean Energy."

When Governor Kasich sent troopers to Cannonball to police the water protectors, Sierra Club hand delivered more than 60,000 petitions asking the Governor to bring the troopers home. The meeting with the Governor's office featured four young Native American women from Ohio, all of whom have ties to the tribal lands affected by the pipeline and were empowered to do the talking. Most recently, Sierra Club sent a delegation of six American Indians to D.C. to participate in the Native Nations March, in which the delegation also met with Ohio elected leaders to express concerns over DAPL and Ohio pipelines, to request reversal of US EPA funding cuts, to defend against Executive Orders that nullify the Clean Power Plan and Methane Rules, and to request support in opposing fracking in Wayne National Forest.

From the beginning, Sierra Club Ohio approached this issue as one of service; the initial action was simply to support youth runners who needed to be fed. The next action was based on a request from several Native American organizations in Ohio to host a protest on Columbus Day where the messaging began to merge their priority issue of DAPL with Sierra Club of Ohio's priority of defending Ohio's clean energy progress. Today, Sierra Club Ohio remains mindful to approach these partnerships and relationships with the utmost respect, ensuring that Native voices are put first in media, that Native people have what they need to best participate, that they feel genuinely respected, and that we continue to share information about their priorities. Now, several of these individuals are becoming embedded into Sierra Club's volunteer structure at the chapter and local group levels, and while their joint pipeline work while branching out to other conservation concerns.

PHOTO PETITIONS

Photo petitions are a visual form of a regular petition: pictures of people holding a sign, writing a message, holding a prop, or with someone in a costume, that are collected and delivered to a target to show broad public support. The photos can also amplify your strategy or increase your political leverage if they are taken in a particular place or involve a particular constituency (photos of people in their favorite parks urging support for conservation funding; or photos of parents with their children asking for support for clean air laws). The photos lend themselves well to TV coverage and video clips. If you're taking the time to do a photo petition, you should consider making the petition delivery into a media event.

WHEN TO USE A PHOTO PETITION

This is a good tactic when you have a longer lead time and you're hoping to create a social media buzz about an issue/campaign. It's also good when you are trying to engage certain audiences, such as younger people or having something fun for people to do at your tabling event. Think about if your message lends itself well to graphics. You really need a large coalition or ideally a large network to get critical mass of individuals to push out your photo petition.

PRO TIPS:

- The visual factor and fun factor makes it a tactic that can be amplified with social media and online organizing.
- Look on your calendar for larger meetings and events where lots of advocates will be gathering and bring materials and take time during the lunch break to have folks quickly make a sign and snap their pic to add to the collection.

HOW TO DO PHOTO PETITIONS

If you have a large coalition or network, you mainly just need to settle on a phrase, slogan or meme. Put a hashtag in front of it and begin to spread it out through your networks. Send out simple instructions to your networks asking people to make a sign and take a photo of themselves or a group of individuals holding the sign. Ask them to share it far and wide through all the social media platforms they use, but most importantly, make sure to put a link in the instructions to an online depository where they can save their picture so you can track all the photo petitions (pics) that are taken and shared. This allows you to keep a running tally and share those numbers when you push the results out to the media. You can make a large collage of some of the better photos for the actual delivery of the photo petitions to the target.

TACTIC IN ACTION

CLEAN POWER PLAN PHOTO PETITION

We have a network-wide example of this tactic. Through a multi-state coordinated campaign, we were organizing support for the Clean Power Plan. Talking about the Clean Power Plan to decision makers and to the public was challenging because as with most policies it's hard to wrap our heads around what it the words on paper would actually mean for ourselves, our families or for the world we live in. Through RE-AMP we've worked with Resource Media who reminded us of a very important lesson, that humans are visual first and verbal second. To drum up more support for the Clean Power Plan we needed to personalize our message. So, we agreed that if we could put a 'face' to the Clean Power Plan we'd be able to engage the public more effectively and make a profound impact on decision makers as they 'saw' all the support for this policy.

What was our goal?

Through our coordinated campaign, partners agreed to engage their staff, members, friends, families and other state allies to collect photos with 5000 faces in it. These individual photos would be delivered to decisions makers at the state level who would be in charge of directing the state implementation plans for the Clean Power Plan.

Did we reach the goal?

We were able to get 2500 faces and in most of the state's hand delivered photos and photo collages to decision makers. We received great earned media coverage. Plus, everyone had a lot of fun collecting the photos. All photos were housed in a shared Flickr account to be used anytime in the future.

What did we learn and what might we do differently?

This tactic was really effective for engaging our non-environmental allies, specifically our faith and youth partners. In some states they were the main collectors of photos. Many people who participated, by taking a photo themselves or collecting photos of others, were not heavily engaged in the campaign itself. Overall, it was a fun, low pressure tactic that anyone felt comfortable engaging in.

While we did a great job getting earned media, we didn't do a very good job utilizing social media to push out the photos. If we had, we would have garnered even more attention. It also required a lot of lead time to even hit 2500 and required someone to constantly be checking in and reminding folks to submit photos. To my knowledge, we haven't really done anything with the photos since the action took place which seems like shame. Because we used the same shared Flickr account it also created some logistical challenges to be able to pull photos out by states. Perhaps something other than Flickr, that would allow for better tagging and therefore searching, would have made it more efficient.

PUBLIC HEARINGS & PUBLIC COMMENTS

Public hearings are official forums set up by decision-making bodies like regulatory agencies and legislative committees to get input from the public on-the-record. These are held on a specific day and time, maybe in a few different locations, while an agency is going through a process for a decision (if a state EPA says they are going to cut air pollution X amount, they may hold a public hearing as they go through the process of considering all the steps they will take to hit that goal, such as requiring factories to put filters on smokestacks).

Sometimes an agency will have a public comment period ("from January 10 to February 10, we are taking public comments") where people can submit input in writing or online. When and if a public hearing or comment period is held will vary depending on the decision-maker and issue, as will the impact it has on the final decision. And as you know, the agency or committee asking for public comment can make it relatively easy, or extremely inconvenient for you and your members to offer comments.

WHEN TO USE HEARINGS & COMMENTS

This seems pretty obvious: When the decision-making body gives you the opportunity. Of course, there's a little more to it than that. You will also want to consider what the potential is for you and your members (or other messengers you organize) to actually have an impact on the decisions, how much is at stake with this policy, opportunity costs, etc.

However, sometimes it will occur to you that there is no opportunity for public comment when there really should be. In in those situations you have a more difficult decision to make, because it is possible to hold "citizen hearings" to gather comments/opinions about a pending environmental policy or regulation, and typically, more importantly, to earn media coverage of the issue.

PRO TIPS:

» Because official hearings can be bureaucratic events they can run late, you may have limited information ahead of time on the logistics, and there may be long preliminary hearings on wonky policy, so do what you can beforehand to gather information and prepare citizens with what to expect.

HOW TO
PUBLIC HEARING & PUBLIC COMMENTS

The different means of generating a good turnout of effective messengers at a public hearing (or written comments during a formal comment period) are undoubtedly infinite. But a strong tactical plan could include emailing coalition members and a VAN generated list in strategically targeted areas followed up by a phone bank and using a combination of multiple versions of sample comments and talking points. Depending on the strength of the response you may want to send them either sample comments or just talking points but a key is to stress referencing personal experience and personal stories.

TOWN HALL MEETINGS, TELE-TOWN HALLS ONLINE OR ACCOUNTABILITY SESSIONS

A town hall meeting is a meeting held to discuss an issue, with the goal of facilitating discussion in the community and gathering input. An elected official or decision-making body might host a town hall, or an organization might hold their own, inviting the decision-maker (or not).

Institute for Agriculture & Trade Policy (IATP) organized town hall meetings called Climate Dialogues, in 2015. Their strategy was to build public support in rural communities by meeting people where they were. Because climate change has become such a politicized issue, they aimed to depoliticize it, by talking about the local impacts like extreme weather, and ground the discussions in the physical/visible truth. They spent six months preparing by meeting with local leaders and decision-makers to understand what people thought about the issue and what got them excited. Then they held a three-day town hall style meeting with a demographically representative constituency (with a balance of ages, genders, political parties, and educational backgrounds).

In the end, they came out with specific recommendations to bring to the city manager and county commissioners, and had specific projects that they helped local people try to find grants or funding to fulfill. After that, they brought these participants to meet with the Department of Agriculture, Department of Health, and legislators to advocate for their recommendations in state-level policy and as part of the Clean Power Plan. For IATP, they used their staff time to have conversations that built relationships, focusing on listening and understanding the priorities of local people.

WHEN TO USE THIS TACTIC

- If your strategy includes showing a lot of public support.
- If there's a high degree of interest in the issue and people would show up to an event because they want to speak about it or learn more. Because it's a forum for people to participate and come together, sometimes town halls will be held in response to something big, that might be related to a community, such as a local park being sold to developers.
- It will mean something to the decision-maker, either because they feel pressure from so many people there or are emboldened to act because so many people are behind them.

HOW TO DO

TOWN HALLS/TELE-TOWN HALLS/ ACCOUNTABILITY SESSION

You can hold a town hall meeting where people are able to ask questions of a decision-maker or expert, contribute to a plan of action, or completely open to whomever shows up and wants to speak. You can also organize a meeting where people attend to listen and the questions to the decision-maker are decided on beforehand.

FLASH MOBS

A flash mob is when a group descends on a public place (a quad on a college campus, a shopping mall or a street) or a location associated with a target and attracts attention with a coordinated action such as song and dance, people in costumes, or "die-ins" with people lying on the ground.

The best way to explain a flash mob is to see one, and there are plenty of examples on YouTube. A few examples include:

Flo6x8

This Spanish group who organizes seemingly spontaneous flamenco dances in front of bank staff and customers with up to several dozen dancers to express anger with the economic crisis. The flamenco dance has a cultural ties to the Andalucia region and is historically connected to protest movements. The dances draw attention and videos help them spread their message.

Idle No More

This group of indigenous communities held a number of flash mobs with up to 500 people gathering with hand drums, rhythm instruments and singing at malls across Canada as well as in the Mall of America in 2012 in response to a Canadian bill that attacked indigenous sovereignty and environmental protections. The flash mobs lasted for less than 15 minutes, with people "appearing" and joining in out of the crowds, but videos and news articles spread widely. The tactics helped demonstrate to the Canadian government the grassroots power they had behind them by getting a lot of people involved, promoting their cultural pride to viewers, and providing a fun, engaging way to for people to get involved.

"Thriller por la Educacion"

WHEN TO USE A FLASH MOB

- If your strategy is to raise the profile of the issue
- If you're looking for a fun and creative way to engage volunteers
- If the visuals, video and photos of an event like this would help your strategy

The YouTube video "Thriller por la Educacion" shows hundreds of Chilean students in zombie garb, recreating Michael Jackson's "Thriller" music video in a public street to draw attention to the death of public education.

Flash Mob for Syria

The YouTube video "Flash Mob for Syria - London Trafalgar Square" shows a few dozen people lying on the ground, covering themselves with flags and then chanting.

BIRD-DOGGING

Bird-dogging means showing up to a public event where a decision-maker will be and asking him or her to take a stance on an issue. These are sometimes events that are set up for public comment (like a town-hall) or they might be somewhere that the decision-maker can be approached (catching them shaking hands with the crowd after a speech), or they could be at a private event where people show up and try to get media attention (bringing a group of people to hang out outside a private fundraiser and try to talk to the media).

In Wisconsin, the Sierra Club used bird-dogging to push Secretary Clinton and Senator Sanders to call for rejecting a proposed pipeline going through Wisconsin. They sent two people to public events during the 2016 Presidential primaries, dressed to blend in with everyone there, and publicly asked Clinton and Sanders where they stood, recorded the results, and amplified their answer in the media and to members. Their strategy was to raise the profile of this issue and force the decision-makers to take a stand. They felt their targets were likely on the right side, but needed to be pushed over the edge and wouldn't have chosen this tactic for decision-makers they thought were strongly opposed to this issue. Eventually, both candidates went on record against the pipeline.

WHEN TO USE BIRD-DOGGING

Often groups will use bird-dogging with candidates running for elected office, when they are on the campaign trail, because this is a time when the candidates are stating their platforms and making public appearances. However, it could be used with decision-makers who aren't elected or who aren't in the middle of a campaign

You should use this when you think asking the question will raise the profile of the issue and the person you're asking is either with you or could be with enough public support, or if you think highlighting that this person is against you on this issue will be a part of your strategy.

PRO TIPS:

- Have a clear question ready and ask it directly, such as "Will you commit to XYZ?" Be ready to ask a follow-up.
- You can ask the question at the formal Q&A portion of an event if there is one and if it's open to any questions, or you can ask by approaching the decision-maker when they are entering or exiting or mingling. Position yourself in the decision-makers path, in a place where they are walking out, shaking hands and be ready to ask the question right away.
- Get there early and find a good spot.
- Work in teams of two or more and have people positioned in different locations around the event.
- Get it on video and use it to add pressure or thank the person.
- For higher level decision-makers, like presidential candidates, their public event schedules may only come out a day or two beforehand, so you need to have people on-call. Getting on their email lists is a good way to find out about events.
- Look for an opportunity to talk with the media, explain why you're there, what the candidate was asked and what their response was.

CIVIL DISOBEDIENCE, DEMONSTRATION OR DIRECT ACTION

A direct action is when members of the public turn out a public space to demonstrate overwhelming public support, take the issue directly to the decision-maker, increase visibility, and increase pressure.

Examples of civil disobedience would include: sit-ins, such as the lunch counter sit-ins in the 1950's and 1960's when African Americans sat at segregated restaurants and refused to leave; Gandhi's Salt March where people marched for 24 days and produced their own salt without paying the heavy British tax to defy British salt monopoly; and when people opposing the Keystone pipeline were rallied outside the White House in 2014 and refused to leave, prompting arrests, or the more recent Dakota Access Pipeline demonstrations at Standing Rock.

In 2013, ISAIAH (a faith group) in Minnesota used direct action to help pass a homeowners bill of rights through the legislature and protect people from foreclosure. They were targeting the Chair of Senate Commerce Committee, who was refusing to bring their bill up before there were compromises with the big banks, repeatedly saying "there needs to be peace in the valley." ISAIAH's strategy was show legislators they weren't going away and capture their attention. First they organized a candlelight vigil with up to 20 people outside office of the Senate Chair for 24 hours, a tactic that was within the comfort zone of their participants but outside the comfort zone of their target. Then, inside the Capitol, they made a gauntlet of activists holding signs of foreclosures throughout counties across the state, which legislators had to walk through, picking a location in the Capitol that is never used for rallying, and prompting one legislator to say this

was breaking the decorum of the Senate. The signs showed this wasn't just a metro issue, but affected a wide constituency.

ISAIAH recommends a few tips for actions like these. Given that this is pretty high up the ladder of engagement for activists, it only makes sense when you've exhausted other means – they had tried to get a hearing on their bill, the Senate Chair wouldn't schedule one. Then, they had an intractable target and really mad base of constituents. Planning tips should include painting a picture for the people participating of what will happen ("some people may get arrested, and they know they might get arrested…if you just do what we plan, you won't get arrested"); scouting the location; and setting up roles including a social media liaison, a police liaison, and marshals to direct people. With direct actions, there is the possibility of someone getting arrested (and/or you might plan for that) so this discussion should be had beforehand, and bail money and procedures need to be in place well before your direct action occurs.

EDUCATIONAL EVENTS

TEACH-INS, COMMUNITY MEETINGS, WEBINARS, ROUNDTABLES, FORUMS, PANELS, CONFERENCE CALLS WITH VIPS

These events, in the context of a campaign strategy, involve recruiting people to hear from speakers, experts, or stakeholders in an effort to bring together a large crowd, deepen understanding of an issue, or build affinity for a campaign or organization. If public education is a part of your group's core mission, then you'll be considering this tactic in a different light. Since our focus in this guide is on policy campaigns, the main reason you would conduct educational events, in most cases, is to educate key messengers to help them deliver a particular message effectively to your target. A good example of a tactic that was a cross between an education event and a house party is the Minnesota toddler toxins story on page 21.

WHEN TO USE EDUCATIONAL EVENTS

- Will an event like this allow you to reach a set of people you wouldn't otherwise, and can you combine it with other strategic goals?
- Are you trying to build access or relationships with issue experts or grasstops leaders and would an event like this appeal to them?

TEXTING

Text messaging can be used to quickly spread information to your list, ask people to take action, or collect petition signatures.

WHEN TO USE TEXTING

- Do you need people to act on something urgent and timely? People are more likely to read a text, but they can easily get turned off if it's not urgent.
- Do you have a set of people who already know the issue? Your space is limited.

PRO TIPS:

- Build or segment your list to the people you think already know about the issue and are likely to act (they've taken action before).
- Draft a short message that focuses on the action to take.
- Send out when timely: A decision is happening, and you need people to act now.
- Send the text from the best messenger as this is the most likely to elicit a response.

TACTIC IN ACTION

In Wisconsin, the Sierra Club has used texting on a campaign to push Secretary John Kerry to reject the Keystone pipeline, texting supporters and asking them to call Kerry. They reserve this tactic for times that are urgent and for people who are already very familiar with the issue (since you don't have space to explain the issue). An advantage is people are more likely read a text than an email, and people are likely to respond quickly so most of your actions will happen in a particular time frame (compared to an email they may read the next day). People can quickly be turned off by getting too many, so you want to reserve this for when something is happening that requires immediate action.

SERVICE PROJECTS

In this tactic, you are recruiting people to an event to do hands-on work in the community, like a river clean-up, delivering meals to seniors, etc. as a way of bringing in a wider constituency of the public and raising visibility for your campaign.

An important question to ask when considering a service project is if an event like this will allow you to reach a set of people you wouldn't otherwise, and if you can combine it with other strategic goals.

PRO TIPS

- If the logistics seem like too heavy of a lift, look for a service project another group is already holding and see if there's a chance to partner
- Have a specific ask to get attendees involved in your other strategic goals, such as signing a petition, signing up for another meeting that already has a date and time, or having a space set up at the event where they can take action. Make sure this ask is direct; volunteers are actively asking attendees, rather than information just sitting on a table in the corner.

TACTIC IN ACTION

FAITH IN PLACE

In 2016, Faith in Place used service projects to involve people in petitions and advocacy. Rev. Debra Williams, for example, leads Faith in Place's Migration & Me program, which engages people of faith in sharing their personal migration stories, connecting their stories to migration of other species As a result, people of faith are inspired to get outdoors and participate in land conservation. Amor De Dios is an enthusiastic participant in Faith in Place's Migration & Me program. As that relationship garnered trust, Amor De Dios began to learn from Rev. Williams about Faith in Place's advocacy efforts on clean energy jobs. As a result, not only did congregants of Amor De Dios sign petitions to their legislators, but they also filled a bus to go to the Statehouse in Springfield, IL, to advocate for clean energy jobs. This example highlights the value of having a menu of programs that allow organizers to meet people where they are, build long-term relationships of trust, and work together for the common good.

WEST MICHIGAN ENVIRONMENTAL ACTION COUNCIL

West Michigan Environmental Action Council (WMEAC) uses an annual river clean up to gather petitions on policy issues. Strategically, this event brings in a wider group of people because it is family-friendly. Each year, about 800 to 1,100 people come to clean up the Grand River, and then they have folks circulating petitions. WMEAC recommends having people actively going up and asking people to sign, rather than passively sitting back.

VISIBILITY TACTICS

CHALKING, POSTERS, BANNERS, FLYERING, DROPPING LITERATURE DOOR-TO-DOOR

Visibility tactics typically involve helping volunteers to create and distribute educational materials. Chalking refers to writing messages in chalk on sidewalks; flyering refers to passing out flyers to people walking by a busy area. In each case you are basically getting a message out--increasing the visibility of your message.

WHEN TO USE VISIBILITY TACTICS

- Is public education part of your strategy? Will it be effective if you reach a lot of people, but with interactions that have less depth? Compared to canvassing or making calls or any personal interaction, these tactics are quicker, so you can get to more people, but comparatively it will be less motivating to the person getting the information. How much do people already know about this issue and how motivated are they already to take some type of action?
- Is there a defined geographic region of people you want to reach, like a legislator's district, that you could effectively reach this way?
- Would the visibility help build a buzz or raise this issue in people's minds that could then augment another tactic you're using?

PRO TIPS:

- Volunteers who have not been trained on how to do the more active forms of engagement (like canvassing) might be more inclined to do passive actions like literature drops. Offering training and individual feedback can be a bridge to make sure the passive tactics supplement, instead of replace, the active tactics.
- Dropping flyers or literature at doors usually is just leaving it in the door crack or on the handle (but not inside the mailbox, which requires a postmark), and not knocking on the door.

ISAIAH in Minnesota has used Lit Drops to create a "ring of fire," picking a one-mile radius around the house of a legislator and dropping flyers at doors asking people to make calls, meaning that that the legislator is getting calls from their neighbors.

PETITION DELIVERY EN MASSE

Petitions are created and used for a wide variety of purposes from applying grassroots pressure on a campaign target, to identifying volunteers, to fundraising. Here we're most concerned with the former, using a petition in a substantive way to demonstrate to a campaign target that a lot of their constituents/customers are passionately supportive of a particular policy position or ask. How you deliver the signed petitions to the target can be critical to how much impact your petitions have. Often, you want to deliver the petitions with as much fanfare and media coverage as possible to build the pressure on your target to respond in the most supportive and positive way.

One of the most common ways to present petitions is by holding a news conference near the location of the target's office. When groups hold a news conference beforehand, they'll often have speakers talk in front of the stack boxes, right before delivering them to the decision-maker.

An important consideration is whether gaining visibility helps your strategy. Petition deliveries can be good visuals for media, provide photos for social media, or attract volunteers or allies to attend.

PRO TIPS

- Collect or gather print-outs of your petitions, organized by city or ZIP code if you want to convey that to the decision-maker.
- Think about a good visual representation for delivering the petitions that conveys there is a large amount. Many times, organizations use boxes and have a long line of volunteers who each carry in a box, and then maybe stacking them up on top of each other.

TACTIC IN ACTION

MOM'S CLEAN AIR FORCE

In 2016, Mom's Clean Air Force used a mass petition delivery in 2016. They collected thousands of Valentines from kids showing support for clean air, and then delivered them in a meeting with EPA Administrator Gina McCarthy in DC. The strategy behind this tactic was that because Administrator McCarthy was someone who generally supports their position, a tactic that was fun and very visible would help them gain access. Administrator McCarthy's office publicized the event, and Mom's Clean Air Force used pictures and videos to spread the event and their message on social media.

SHAREHOLDER ACTIVISM

Shareholder activism involves organizing a group of shareholders in a company to try to influence the company from within by passing a resolution, speaking out to the public, or directly changing a corporate policy. Sometimes literally changing a corporate policy is the goal of this tactic, but often it's just using the threat of offering a resolution that brings the company to the bargaining table.

WHEN TO USE SHAREHOLDER ACTIVISM

- Do you have supporters who are shareholders? Or do you think a good amount of the shareholders on your side?
- Is the decision-maker an individual in a corporation? Do you need a new way to increase your leverage with him or her?

HOW TO DO SHAREHOLDER ACTIVISM

Figure out the different actions that are possible in the company you are looking at by working with a lawyer, Ceres (a business leadership non-profit) or the U.S Securities & Exchange Commission. The actions you can take and the process will vary by corporation, and these folks can help. You can reach out to other groups that have done shareholder activism or look at past resolutions to figure out appropriate language.

TACTIC IN ACTION

PRAIRIE RIVER NETWORK

In Illinois, Prairie River Network used an investor letter to target the coal industry and get media. They organized investors of the company to sign on to a letter outlining the decline of the coal industry and bringing up corporate instability. While they knew this was not going to make the coal plant change policy, it forced them to talk about the issue on their next investor call and allowed Prairie River Network to generate media coverage including in investor-focused media outlets.

REPOWER MADISON

In July 2014, RePower Madison worked with shareholders to propose two shareholder resolutions to the utility company Madison Gas & Electric (MGE): one to fund a study to get to 25 percent clean energy by 2025 and the other to link executive compensation to increases in clean energy. Because MGE is an investor-owned utility, shareholders have a good amount of power. Their strategy was to increase public pressure because regardless of if it passed, just introducing the resolution gave them leverage because it meant all shareholders got a copy of it in the mail, holding a vote allows people to voice their support, and it can generate media coverage. RePower worked to identify shareholders, who then formed an independent group. The plan to introduce the resolutions lead MGE to negotiate with the shareholders and agree to the study, agree to continue to meet with the shareholders on this, and publish a joint press release.

To make this happen, RePower Madison had to make sure they knew all the steps and rules to introducing a resolution; for instance, the shareholder who introduced it had to hold at least $2,000 in stock for a year.

USING PLANS WITH METRICS TO EVALUATE YOUR TACTICS

Here are a couple examples of ways you could use metrics and formulas to make a plan for a grassroots tactic and then be able to evaluate how you are doing.

As you plan, come up with what you expect to happen at each step by either making an educated assumption or by using data from previous experience; then track what's happening, and look for where to improve. For example, "I believe that one out of every two people we call will say yes to signing the petition" or "When we did this before, we saw that half the people who RSVP'd to the town hall showed up, so we should plan on that."

Then, as you're going, you can use these numbers to see where you are at and identify exactly what part of your plan you need to focus on fixing; "I thought one out of two people would sign the petition, that's correct, but I thought we would talk to ten people in an hour, and we're only talking to eight ... we need to fix something to make sure we're talking to ten" or "we are only going to be able to talk to eight people in an hour … this means we're going to need to do more hours than we had in our plan if we're going to hit the goal."

Really what you're doing here is just using rates and then planning out each step.

EXAMPLE #1: You want to use volunteers to do door-to-door canvassing and collect 500 petition signatures

MAKE YOUR PLAN

Start with just breaking down each step and come up with a planning rate or estimated production rate for each one. First, you're going to knock on doors - how many can one person knock in a given amount of time, like an hour or a day? Next, people may or may not be home; how many will be home out of each one you knock? Then, you're going to ask them to sign a petition; how many that you ask will say yes?

PLANNING RATES

The examples below are somewhat realistic; some of the factors that will influence this are the location, the demographics of who you're talking to, and the issue. Again, direct experience is your best guide, and as you get started, you will adjust.

- **2 out of 3 people** you talk to will sign the petition (66 percent yes rate)
- **1 out of 5 doors** you knock on, someone will answer and talk to you (20 percent contact rate)
- **1 volunteer** can knock on **30 doors in an hour** in this neighborhood
- **1 volunteer hour = 30 doors knocked = 6 people talked to = 4 petitions**
- **500 petitions = 125 volunteer hours**
- We will ask each volunteer **to commit to 10 hours** for the campaign
- **125 volunteers hours = 13 volunteers**
- We assume that some volunteers who say yes will not followthrough, but that **two-thirds will follow-through (66 percent show rate)**
- **13 volunteers = 20 people say yes to volunteering**

EVALUATING IT

On one day, four volunteers go out for two hours each and your goal was to get 32 petitions (eight volunteer hours X four petitions per hour = 32), but you only get 28. What happened?

- Volunteer A knocked on 50 doors, talked to 10 people, and got 7 petitions
- Volunteer B knocked on 49 doors, talked to 8 people, and got 6 petitions
- Volunteer C knocked on 51 doors, talked to 11 people, and got 8 petitions
- Volunteer D knocked on 52 doors talked to 10 people, and got 7 petitions

Totals: 202 doors, 39 conversations, 28 petitions

- The team knocked on 25 doors per hour (202 divided by 8 volunteer hrs), and you planned for 30 per hour
- Your contact rate was 19 percent (39 people talked to out of 151 doors), and you planned for 20 percent
- Your yes rate was 72 percent (28 people said yes out of 39), and you planned for 66 percent

Looking at each of those, **the biggest reason you were short of the goal was the number of doors you knocked.** You talked to just about enough people (19 percent) and enough people said yes (72 percent), but you didn't knock on enough doors.

SOLUTION

Maybe it is only possible for you to knock on 25 doors in an hour and not 30, and you'd have to adjust your plan to do more hours. But, if you've done this before and have data that shows people can do 30 doors in an hour, then you'd know there is something to fix here, and this is where you'd ask, "What can we do to knock just a few more doors in an hour?" Maybe the answer is the maps volunteers had were unclear, and they wasted time figuring out where to go; or maybe they made it to less doors because they had long conversations with a few people who were never going to give support; or maybe this team just needed a little more motivation to move a little quicker and a quick check-in toward the end of the day would help. Any of these things could affect how many doors you knock on, and you'd need to investigate. The point is, with these rates, you know where to look!

You can use the rate to motivate people for the next time. "Look, what if we did everything else the same, but just knocked on five more doors an hour each, we would beat the goal and get 33 petitions." (240 doors X 19 percent contact rate = 46 people talked to X 72 percent yes rate = 33 petitions)

EXAMPLE #2: You want to turn out 50 people who support your cause to a townhall meeting

MAKE YOUR PLAN:

Start with breaking down each step and come up with a planning rate for each one. What are different ways you are going to get people there? For each way you ask people, how many people will you talk to you and how many will say yes?

Again, the best way to come up with any rate is to use past experience and real data. If you don't have that yet (if it's first time you're doing a tactic), make a plan based on what you'd expect. Either way, making a plan with numbers will allow you to evaluate as you go and will be helpful in figuring out what to adjust.

PLANNING RATES

- We're going to plan on 50 percent of the people who say they are coming will show up (**50 percent show rate**), so to get a 50 people there, we need to get 100 people to say yes.
- We will post on social media, where we have **1,000 followers**, and we're going to plan on getting **20 people to say yes** from this.
- We will email our list of 5,000 people, usually **10 percent of people open it**, so that's **50 people**, and we will plan on **10 people to say yes** from this.
- We will ask **ten other organizations** to email their lists and plan on getting **50 people from this.**
- We will phonebank a list of people affected by this issue. In **one hour of calling,** we can talk to **six people, and two will say yes**. We will get **20 people to say yes by calling for ten hours.**

For something like a townhall meeting, you may also do passive forms of recruitment, like flyers, posters, yard signs, etc. that won't allow you to track "yeses" beforehand. While it's good to do the passive forms of recruitment as well, if you want to make sure you get a certain amount of people there, make a plan using tactics you can control and tactics you can track that add up to your goal.

EVALUATING IT

As you go, you might check in with how it's going. Say you've got one week left, and you're at:

- Goal: 20 yeses from social media, Actual: Six
- Goal: 10 yeses from your email list, Actual: Five
- Goal: 50 yeses from 10 other groups emailing their list, Actual: 60
- Goal: 20 yeses from 10 hours of phonebanking, actual: 18

Overall goal: 100 yeses, 89 actual

Looking at this tells you a lot about what you could do to hit the goal. Your social media rate was a lot lower than expected; is there something you can fix here, such as changing the message of yourpost or the timing of when it went out? Or you might say, the thing that's worked best is getting other groups to email their list, can we get two more groups to do that? Or, from phonebanking, we got a little under two yeses for each hour of calling, so we could get our last 11 yeses by doing another six hours of calling.

TRAINING

We wanted to take some space to add a few examples of practices for training volunteers or staff on grassroots tactics. Many organizations will have their own training methods and these examples will not be comprehensive nor are they meant to be "the only ways to do it." Hopefully, though, they will be examples of useful principles and how they could be applied to training people. These are some ways to train people, but not all the ways to train people.

DEMONSTRATE

Role-plays can be an effective way to practice any tactic that involves talking to other people, from canvassing to phonebanking. It's also a great way to build confidence with people. If you're sitting down to phonebank a list, having the trainer first role-play calling the volunteer and then having the volunteer call the trainer is almost always worth the time in terms of improving people's effectiveness.

People learn a ton just by seeing someone else doing something and is more effective than someone explaining it to them. Having a new volunteer watch an experienced volunteer canvass one or two doors or being in the same room where they can overhear a phonebank will teach someone more than giving them a long overview about the principles of doing either.

GIVE FEEDBACK

One way to do this is to use numbers and rates to clearly point out what's happening. Say, for example, you're phonebanking and asking people to come to a meeting. You can see that for your group of ten volunteers, each volunteer, on average, called 30 numbers in an hour, ten people picked up, and five said yes. For Volunteer A, they called through 20 numbers in an hour, seven people picked up, and three said yes. Volunteer A's first reaction might be "well, not many people picked up." But if you look at the numbers, you can clearly say that the number of people who picked up and the number of people who said yes were right on pace with what was expected, but the volunteer was short was because he or she only dialed 20 numbers when most people could get to 30. Using the numbers makes your feedback clear and also gives people a very specific thing they can improve: "Don't spend as much time talking to each person, get to more numbers."

DEBRIEF

Even a short debrief with a volunteer after a tactic will go a long way; if you need to, it's worth cutting down the time of the actual tactic to make sure it happens. A basic agenda would be something like: What did you think? What were your goals and how did you end up? Here's something I noticed that you were particularly good at or that might make it go better. Here is the next thing coming up ... can we sign you up to help?

DEVELOP LEADERS

We're all limited in how many volunteers we can take on, by how many leaders we have to train, manage, and track the results. The principles listed above can be applied to training more leaders as well. Demonstrate to someone how to run a phonebank by having them shadow you: "I think you can be a real leader on our next phonebank. Tonight, I want you to watch how I run it, and then you can run the next one." Give people feedback on how they did as a leader, as in how the whole group they led did, using clear goals and actual numbers. Then, debrief people on the leadership they take on: How's going, and what can they do next ... they can train more leaders themselves!

ADDITIONAL RESOURCES

Here are a few places you might look for additional grassroots organizing planning resources and tips.

WELLSTONE TRAININGS

Camp Wellstone, www.wellstone.org/programs/camp-wellstone

"We train candidates, campaign workers, and organizers how to win progressive change. We draw from Paul and Sheila Wellstone's innovative approach to politics - something we call the Wellstone Triangle. The three elements of the triangle are: progressive public policy, which lays out an agenda for action; grassroots community organizing, which builds a constituency to fight for change; and grassroots electoral politics, which provides tools for changing what leadership looks like and how to influence policymakers."

ORGANIZING FOR SOCIAL CHANGE: MIDWEST ACADEMY MANUAL FOR ACTIVISTS BY MIDWEST ACADEMY

A manual that includes the Midwest Academy Strategy Chart, and helpful resource on it's own for going through developing a strategy for a campaign.

The following are all available at www.reamp.org/resources/organizing-hub/

THE ART OF CAMPAIGN PLANNING BY THE RE-AMP ORGANIZING HUB

A collection of best practices in campaign planning from seasoned campaign planners within and outside of the RE-AMP network. It is a guide for putting together effective issue campaigns, based on a review of campaign plans and planning processes, interviews with campaign planners, and a review of campaign planning literature.

POWER ANALYSIS FOR STATE TABLES: A GUIDE FOR ANALYZING YOUR POWER AS A COALITION BY THE RE-AMP ORGANIZING HUB

A power analysis is a data-driven process and tool that illustrates where and how much power an organization or a coalition of organizations has to move their agenda forward. It also shows where an organization or coalition does not have power, and therefore, informs how and where to strategically build power.

POWER MAPPING BEST PRACTICES BY RE-AMP

Some of the systems commonly used to find the right ways to target decision makers.

CAMPAIGN COMMUNICATIONS PLANNING SHEET BY THE RE-AMP ORGANIZING HUB

GRASSTOPS DEVELOPMENT GUIDE BY SELP

A guide to creating and implementing systematic, sustainable grasstops networks.

GRASSROOTS TACTICS PLANNING GUIDE
MAY 2017

RE-AMP